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Russian Federation

Oilseeds and Products Annual

Annual

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Report Highlights:

Russia's production of the main oilseeds crops (sunflowerseeds, soybeans and rapeseeds) in 2010 is forecast at 8.5 million metric tons (MMT), including 6.8 MMT of sunflowerseeds. Demand for protein feeds will be growing and production of oilseeds meal is forecast at 4.3 MMT. Production of vegetable oil is forecast at 3.2 MMT. In 2010 Russia will continue to increase imports of soybeans. Imports of soybean meal are forecast to increase to 0.5 MMT in spite of a 5 percent import duty. These imports will be driven by high domestic demand for protein feeds. Exports of meal and oil are forecast at 1.0 MMT and 0.9 MMT respectively; slightly lower than in MY 2009. The decrease was caused by high domestic demand and strengthening ruble.

Executive Summary:

Oilseeds

Assuming the normal weather conditions Russia's production of the main oilseeds crops (sunflowerseeds, soybeans and rapeseeds) in 2010 is forecast at 8.5 million metric tons. This represents a 7.6 percent increase from last year, when sunflowerseeds and rapeseeds yields were affected by poor weather. The sunflowerseeds crop is forecast at 6.8 MMT compared with 6.4 MMT in 2009. Soybean production is forecast at 970,000 metric tons (MT), 3 percent higher than last year; rapeseed production is forecast at 760,000 MT, a 14 percent increase from the weather affected crop in 2009. Exports of oilseeds will remain low due to export tariffs and strong domestic demand for oilseeds. In 2010 Russia will continue to increase imports of soybeans. Soybean imports are forecast at 980,000 MT. Domestic crush of oilseeds is forecast to reach 8.8 MMT; including 6.2 MT of sunflowerseeds, 1.9 MMT of soybeans, and 0.7 MMT of rapeseeds. Exports of meal and oil are forecast at 1.0 MMT and 0.9 MMT respectively; slightly lower than in MY 2009. The decrease is caused by high domestic demand and strengthening ruble.

Table 1. Russia: Consolidated PSD for Major Oilseeds for MY 2010, 1,000 Metric Tons, Area in 1,000 Hectares.

| MY 2010/11 | Sunflowerseeds | Soybeans | Rapeseeds | Peanuts | TOTAL |
|---|----------------|----------|-----------|---------|--------|
| Area Planted | 6,300 | 1,000 | 650 | 0 | 7,950 |
| Area Harvested | 5,800 | 850 | 630 | 0 | 7,280 |
| Beginning Stocks | 245 | 64 | 101 | 8 | 418 |
| Production | 6,800 | 970 | 760 | 0 | 8,530 |
| MY Imports | 10 | 980 | 0 | 105 | 1,095 |
| MY Imp. from U.S. | 0 | 150 | 0 | 15 | 165 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 |
| Total Supply | 7,055 | 2,014 | 861 | 113 | 10,043 |
| MY Exports | 50 | 10 | 80 | 0 | 140 |
| MY Exp. to EU | 20 | 0 | 75 | 0 | 95 |
| Crush | 6,200 | 1,920 | 680 | 0 | 8,800 |
| Food Use Dom. Cons. | 220 | 0 | 0 | 105 | 325 |
| Feed Waste Dom. Cons. | 400 | 20 | 20 | 0 | 440 |
| Total Dom. Cons. | 6,820 | 1,940 | 700 | 105 | 9,565 |
| Ending Stocks | 185 | 64 | 81 | 8 | 338 |
| Total Distribution | 7,055 | 2,014 | 861 | 113 | 10,043 |
| Source: Based on PSD tables for each crop | | | | | |

Meal

Driven by growth of domestic poultry and pig production and expected improvement in dairy production, Russia's demand for protein feeds will continue to grow. Most of this demand will be met by the domestic production of oilseeds meal. The total meal production is forecast to reach 4.3 MMT; including production of sunflowerseed meal is forecast at 2.3 MMT, production of soybean meal is forecast at 1.5 MMT (51 percent from imported beans), and production of rapeseed meal is forecast at 0.4 MMT. Russia's production of fish meal will remain low – slightly over 0.1 MMT. Driven by increasing demand for protein feeds, imports of soybean meal are forecast to increase from 390,000 MT in MY 2009 to 450,000 MT, in spite of 5 percent import duty. The total imports of protein meals are forecast at 530,000 MT. At the same time Russia's exports of oilseeds meal is forecast at the last year level – 1.1 MMT, including 0.9 MMT of sunflowerseed meal, 125,000 MT of rapeseeds meal, and 20,000 MT of soybean meal.

Table 2. Russia: Consolidated PSD for Major Meals for MY 2010, 1,000 Metric Tons, Area in 1,000 Hectares

| MY 2010/11 | Sunflowerseed | Soybean | Rapeseed | Fish Meal | TOTAL |
|---|---------------|---------|----------|-----------|-------|
| Crush | 6,200 | 1,920 | 680 | 400 | 9,200 |
| Extr. Rate, 999.9999 | 0.372 | 0.786 | 0.603 | 0.288 | |
| Beginning Stocks | 11 | 40 | 0 | 3 | 54 |
| Production | 2,305 | 1,510 | 410 | 115 | 4,340 |
| MY Imports | 15 | 450 | 0 | 65 | 530 |
| MY Imp. from U.S. | 0 | 45 | 0 | 0 | 45 |
| MY Imp. from EU | 0 | 120 | 0 | 10 | 130 |
| Total Supply | 2,331 | 2,000 | 410 | 183 | 4,924 |
| MY Exports | 900 | 20 | 125 | 28 | 1,073 |
| MY Exp. to EU | 0 | 0 | 50 | 0 | 50 |
| Industrial Dom. Cons. | 0 | 0 | 0 | 0 | 0 |
| Food Use Dom. Cons. | 0 | 0 | 0 | 0 | 0 |
| Feed Waste Dom. Cons. | 1,410 | 1,955 | 285 | 147 | 3,797 |
| Total Dom. Cons. | 1,410 | 1,955 | 285 | 147 | 3,797 |
| Ending Stocks | 21 | 25 | 0 | 8 | 54 |
| Total Distribution | 2,331 | 2,000 | 410 | 183 | 4,924 |
| Source: Based on PSD tables for each meal | | | | | |

Oil

Vegetable oil remains the dominant product of Russia's oilseeds crushing industry. However, the share of meal and cake is increasing, while crushing for oil remains stable. The total production of vegetable oil in 2010 is forecast at 3.17 MMT, while in 2009 this production was 3.11 MMT. Exports of vegetable oil are forecast at 0.9 MMT, a 3 percent increase from last year. Imports of vegetable oil are forecast at the last year's level of 0.6 MMT, and palm oil will comprise almost 90 percent of these imports.

Table 3. Russia: Consolidated PSD for Major Vegetable Oils for MY 2010, 1,000 Metric Tons, Area in 1,000 Hectares

| MY 2010/11 | Sunflowerseeds | Soybean | Rapeseed | Palm | TOTAL |
|--|----------------|---------|----------|------|-------|
| Crush | 6,200 | 1,920 | 680 | | 8,800 |
| Extr. Rate, 999.9999 | 0.413 | 0.180 | 0.394 | | |
| Beginning Stocks | 20 | 5 | 10 | 10 | 45 |
| Production | 2,560 | 345 | 268 | 0 | 3,173 |
| MY Imports | 50 | 20 | 0 | 500 | 570 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 |
| MY Imp. from EU | 0 | 12 | 0 | 0 | 12 |
| Total Supply | 2,630 | 370 | 278 | 510 | 3,788 |
| MY Exports | 600 | 145 | 120 | 0 | 865 |
| MY Exp. to EU | 220 | 90 | 65 | 0 | 375 |
| Industrial Dom. Cons. | 320 | 30 | 20 | 100 | 470 |
| Food Use Dom. Cons. | 1,650 | 190 | 120 | 400 | 2,360 |
| Feed Waste Dom. Cons. | 35 | 0 | 0 | 0 | 35 |
| Total Dom. Cons. | 2,005 | 220 | 140 | 500 | 2,865 |
| Ending Stocks | 25 | 5 | 18 | 10 | 58 |
| Total Distribution | 2,630 | 370 | 278 | 510 | 3,788 |
| Source: Based on PSD tables for each vegetable oil | | | | | |

Commodities:

Oilseed, Sunflowerseed
 Oilseed, Soybean
 Oilseed, Rapeseed
 Oilseed, Peanut

Production:

Russia's production of the major oilseed crops (sunflowerseeds, soybeans and rapeseeds) is forecast to increase in 2010 to 8.5 MMT from 8.0 MMT in 2009 and will be driven by the following factors:

- Yields of sunflowerseeds and rapeseeds in 2009 were lower than average due to unfavorable weather;
- Prices of wheat, Russia's major grain crop, will remain low and area sown to oilseeds is forecast to increase at the expense of grain;
- Demand for protein feeds is growing in Russia and, according to specialists, farms will increase area sown to soybeans and rapeseeds;
- Specialists consider that the climate in many agricultural territories of Russia is good for production of rapeseeds. In 2009 export demand for rapeseeds and rapeseed oil was supported by growing domestic demand for rapeseed meal. Transportation, storing and crushing of rapeseeds is also improving.

Oilseeds production is forecast to grow, but production challenges remain significant. Farmers' investments in seeds, fertilizer and machines are constrained by the financial crisis. Unresolved land ownership issues seriously limit farmers' access to credit. In 2010 an increase of oilseeds production will be driven primarily by increased area and yields will depend primarily on weather.

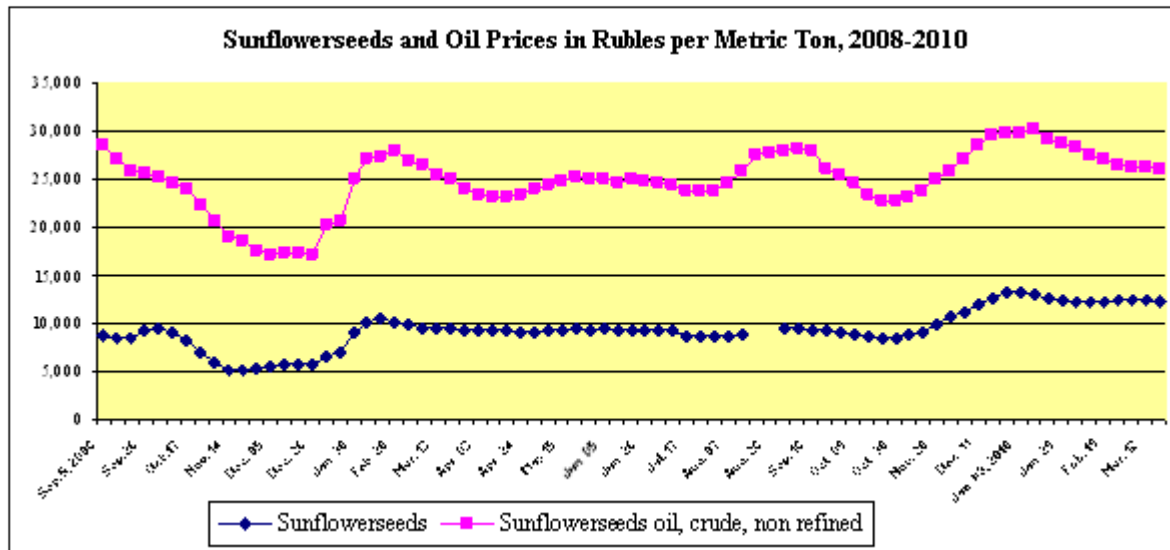
Table 4. Russia: Major Oilseed Crops, Planted Area, Production, Yields

| | 2005 | 2006 | 2007 | 2008 | 2009 | Average 2005-2009 |
|--|-------|-------|-------|-------|-------|-------------------|
| Planted Area (1,000 hectares) | | | | | | |
| Sunflowerseeds | 5,568 | 6,155 | 5,326 | 6,199 | 6,189 | 5,887 |
| Soybeans | 718 | 845 | 777 | 747 | 874 | 792 |
| Rapeseeds | 244 | 512 | 658 | 680 | NA | NA |
| Yields (Metric Tons per Harvested Hectares) | | | | | | |
| Sunflowerseeds | 1.19 | 1.14 | 1.13 | 1.23 | 1.15 | 1.17 |
| Soybeans | 1.05 | 0.99 | 0.92 | 1.05 | 1.19 | 1.04 |
| Rapeseeds | | | | | | |
| - winter | 1.77 | 1.60 | 1.56 | 1.76 | 1.82 | 1.69 |
| - spring | 1.10 | 1.07 | 1.04 | 1.04 | 0.93 | 1.04 |
| Production (1,000 Metric Tons) | | | | | | |
| Sunflowerseeds | 6,470 | 6,743 | 5,671 | 7,350 | 6,425 | 6,532 |
| Soybeans | 686 | 805 | 650 | 746 | 942 | 766 |
| Rapeseeds | 304 | 522 | 630 | 752 | 667 | 575 |
| Total | 7,460 | 8,070 | 6,951 | 8,848 | 8,034 | 7,873 |

Source: State Statistical Service of the Russian Federation, SovEcon

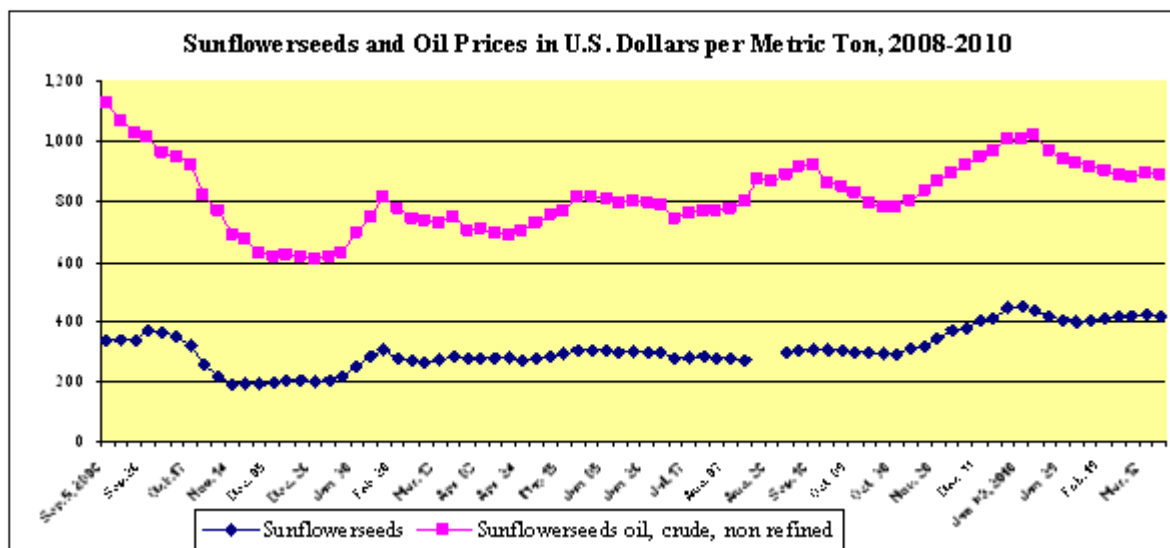
Production of other oilseed crops (such as flax, false flax and mustard) in the last 5 years was not significant. Cost of production of these minor oilseed crops vary significantly, but in most cases is higher than the cost of production of sunflowerseeds. Farmers produce flax and mustard and other smaller oilseed crops only when they have contracts for production of these crops with some specialized crushing companies. In contrast, the market for sunflowerseeds and soybeans provides more opportunities.

Graph 1. Russia: Sunflowerseeds and Sunflowerseed Oil Prices in Rubles, 2008-2010



Source: ProZerno

Graph 2. Russia: Sunflowerseeds and Sunflowerseed Oil Prices in U.S. Dollars, 2008-2010



Source: ProZerno

Trade:

Russia's exports of major oilseeds (sunflowerseeds, soybeans and rapeseeds) in MY 2010 are forecast at 140,000 MT. In MY 2009, export duties and high domestic demand prevented an increase of oilseeds exports despite the low ruble exchange rate in the first months of MY 2009. The present strengthening of ruble may also decrease exports in MY 2010.

The decrease of sunflowerseeds exports in MY 2009 was due to a poor crop, high crushers' demand, high export duties and strengthening ruble. In September 2009 – through February 2010 Russia exported only 8,115 MT of sunflowerseeds, compared with over 100,000 MT in the same period a year ago.

| Table 5. Russia: Sunflowerseeds Exports, Metric Tons | | | |
|--|---------|------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 159,620 | The World | 30,000 |
| Kazakhstan | 73,409 | Kazakhstan | 15,000 |
| South Africa | 45,013 | Azerbaijan | 10,000 |
| Turkey | 9,805 | Armenia | 3,000 |
| Italy | 9,791 | Uzbekistan | 1,000 |
| Uzbekistan | 6,800 | | |
| Azerbaijan | 4,412 | | |
| Kyrgyzstan | 2,642 | | |
| Israel | 2,220 | | |
| Tajikistan | 2,053 | | |
| Armenia | 1,687 | | |
| Other | 1,788 | Other | 1,000 |
| MY for sunflowerseeds is from September through August | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Imports of sunflowerseeds is not significant and is primarily composed of planting seeds, including seeds that go to the selection stations for breeding, testing and multiplication.

| Table 6. Russia: Sunflowerseeds Imports, Metric Tons | | | |
|--|---------|---------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 11,879 | The World | 10,000 |
| United States | 3,426 | Turkey | 3,500 |
| Turkey | 2,507 | Ukraine | 2,500 |
| France | 936 | United States | 1,500 |
| Argentina | 764 | Kazakhstan | 500 |
| Romania | 616 | | |
| Italy | 579 | | |

| | | | |
|--|-------|-------|-------|
| Hungary | 509 | | |
| Ukraine | 505 | | |
| Moldova | 465 | | |
| Spain | 310 | | |
| Other | 1,262 | Other | 2,000 |
| MY for sunflowerseeds is from September through August | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Russia's imports of soybeans for crushing is growing along with expansion of domestic crush and increasing demand for soybean meal. Imports of soybeans in 2010 is forecast at 980,000 MT. From September 2009 through February 2010 Russia imported almost 463,372 MT of soybeans (45 percent increase on a year-to-year basis). Imports from the U.S. were 73,970 MT.

| Table 7. Russia: Soybeans Imports, Metric Tons | | | |
|--|---------|---------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 836,701 | The World | 910,000 |
| Paraguay | 381,700 | Brazil | 410,000 |
| Brazil | 350,225 | Paraguay | 300,000 |
| Canada | 40,938 | United States | 100,000 |
| Uruguay | 27,498 | Canada | 50,000 |
| United States | 25,909 | | |
| Ukraine | 9,102 | | |
| Moldova | 1,207 | | |
| | | | |
| | | | |
| | | | |
| Other | 122 | Other | 50,000 |
| MY for soybeans is from September through August | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Russia increased exports of rapeseeds in MY 2009, but in MY 2010 exports are forecast to decrease to 80,000 MT due to high domestic crushers' demand.

| Table 8. Russia: Rapeseeds Exports, Metric Tons | | | |
|---|---------|-------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 62,539 | The World | 110,000 |
| Germany | 16,093 | Netherlands | 31,175 |
| Lithuania | 14,846 | Germany | 21,140 |
| Netherlands | 11,763 | Greece | 17,980 |
| Denmark | 7,460 | Belgium | 14,690 |
| Mongolia | 6,556 | Finland | 6,600 |

| | | | |
|--|-------|----------------|-------|
| Austria | 3,117 | United Kingdom | 2,630 |
| China | 2,016 | Iran | 2,465 |
| Latvia | 687 | Mongolia | 1,800 |
| | | Turkey | 1,500 |
| | | Austria | 1,105 |
| Other | 1 | Other | 8,915 |
| MY for rapeseeds is from July through June | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Imports of peanuts begin in spring and summer, and from October 2009 through January 2010 Russia imported only 27,625 MT of peanuts. However, this was 7 percent more than in October 2008 – January 2009. Given an increase of ruble to USD ratio, imports of peanuts are estimated at 100,000 MT in MY 2009, and is forecast to increase to 105,000 MT in MY 2010.

| Table 9. Russia: Peanuts Imports, Metric Tons | | | |
|--|---------|---------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 85,000 | The World | 100,000 |
| Argentina | 33,760 | Argentina | 35,000 |
| China | 22,685 | China | 25,000 |
| Brazil | 5,970 | Brazil | 11,000 |
| Uzbekistan | 5,850 | United States | 10,000 |
| United States | 5,495 | Uzbekistan | 9,500 |
| Tajikistan | 5,150 | Tajikistan | 8,500 |
| Nicaragua | 2,320 | | |
| Paraguay | 1,760 | | |
| Vietnam | 230 | | |
| Mozambique | 225 | | |
| Other | 1,555 | Other | 1,000 |
| MY for peanuts is from October through September | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Policy:

Russia does not have a nationwide strategy for developing oilseed production, although the Russian Ministry of Agriculture declares it must increase the production of protein feeds. This declaration has not been supported by any concrete measures except the general policy of subsidizing interest rates, restricting fuel prices, and subsidizing seeds. Indirectly oilseed production and processing is supported by subsidizing investments into poultry and livestock production.

In order to increase domestic oilseed crush the Russian government keeps export duties on major oilseeds high: the export duty on sunflowerseeds is 20 percent of customs value, but not less than 30 Euros per metric ton. The export duty on soybeans is also 20 percent of the value, but not less than 35

Euros per metric ton. The export duty on rapeseeds is 15 percent, but not less than 30 Euros per metric ton. The export duty on mustard is 10 percent of the customs value, but not less than 25 Euros per metric ton.

Import duties on sunflowerseeds, rapeseeds and various other oilseeds remain at five percent of the customs value. Soybeans and peanuts are imported duty-free.

Opportunities for U.S. soybeans

Given the growth in Russian domestic poultry, pig and dairy industries, consumption of soybean meal will continue to increase and the demand for imported beans will also be strong. In MY 2009 Russia's imports of soybeans are estimated at \$446 million, an increase of 12 percent over MY 2008 level. In MY 2008 the United States was only a minor supplier to Russia, exporting \$11 million, however estimates for MY 2009 imports from the U.S. are approximately \$45 million. Currently phytosanitary and veterinary issues impede trade as shipments are allowed on a "case by case basis". If these SPS obstacles are addressed, there is ample opportunity to hit \$70-\$80 million in U.S. soybean exports to Russia.

Production, Supply and Demand Data Statistics:

Table 10. PSD, Sunflowerseeds, 1,000 Metric Tons, 1,000 Hectares

| Oilseed, Sunflowerseed Russia | 2008 | | | 2009 | | | 2010 | | |
|----------------------------------|--------------------------------|-------|-------------|--------------------------------|-------|-------------|--------------------------------|--|-------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Sep 2008 | | | Market Year Begin: Sep 2009 | | | Market Year Begin: Sep 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Area Planted | 5,200 | 6,200 | 5,200 | 0 | 6,300 | 6,190 | | | 6,300 |
| Area Harvested | 6,000 | 6,100 | 6,000 | 5,600 | 6,150 | 5,590 | | | 5,800 |
| Beginning Stocks | 290 | 290 | 290 | 575 | 545 | 575 | | | 245 |
| Production | 7,350 | 7,350 | 7,350 | 6,425 | 7,000 | 6,425 | | | 6,800 |
| MY Imports | 12 | 5 | 12 | 10 | 10 | 10 | | | 10 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Supply | 7,652 | 7,645 | 7,652 | 7,010 | 7,555 | 7,010 | | | 7,055 |
| MY Exports | 160 | 220 | 160 | 100 | 150 | 30 | | | 50 |
| MY Exp. to EU | 70 | 40 | 70 | 70 | 40 | 0 | | | 20 |
| Crush | 6,210 | 6,100 | 6,210 | 6,045 | 6,300 | 6,105 | | | 6,200 |
| Food Use Dom. Cons. | 215 | 220 | 215 | 220 | 220 | 220 | | | 220 |
| Feed Waste Dom. Cons. | 492 | 560 | 492 | 400 | 480 | 410 | | | 400 |
| Total Dom. Cons. | 6,917 | 6,880 | 6,917 | 6,665 | 7,000 | 6,735 | | | 6,820 |
| Ending Stocks | 575 | 545 | 575 | 245 | 405 | 245 | | | 185 |
| Total Distribution | 7,652 | 7,645 | 7,652 | 7,010 | 7,555 | 7,010 | | | 7,055 |

Table 11. PSD, Soybeans, 1,000 Metric Tons, 1,000 Hectares

| Oilseed, Soybean Russia | 2008 | | | 2009 | | | 2010 | | |
|----------------------------|--------------------------------|-----|-------------|--------------------------------|-----|-------------|--------------------------------|--|-------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Sep 2008 | | | Market Year Begin: Sep 2009 | | | Market Year Begin: Sep 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Area Planted | 725 | 950 | 725 | 725 | 980 | 874 | | | 1,000 |
| Area Harvested | 709 | 750 | 709 | 792 | 770 | 792 | | | 850 |
| Beginning Stocks | 40 | 40 | 40 | 92 | 45 | 92 | | | 64 |
| Production | 744 | 740 | 744 | 942 | 760 | 942 | | | 970 |

| | | | | | | | | | |
|-----------------------|-------|-------|-------|-------|-------|-------|--|--|-------|
| MY Imports | 837 | 460 | 837 | 950 | 500 | 910 | | | 980 |
| MY Imp. from U.S. | 26 | 0 | 26 | 0 | 0 | 100 | | | 150 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Supply | 1,621 | 1,240 | 1,621 | 1,984 | 1,305 | 1,944 | | | 2,014 |
| MY Exports | 2 | 50 | 2 | 5 | 60 | 10 | | | 10 |
| MY Exp. to EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Crush | 1,497 | 1,125 | 1,497 | 1,850 | 1,180 | 1,850 | | | 1,920 |
| Food Use Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Feed Waste Dom. Cons. | 30 | 20 | 30 | 50 | 20 | 20 | | | 20 |
| Total Dom. Cons. | 1,527 | 1,145 | 1,527 | 1,900 | 1,200 | 1,870 | | | 1,940 |
| Ending Stocks | 92 | 45 | 92 | 79 | 45 | 64 | | | 64 |
| Total Distribution | 1,621 | 1,240 | 1,621 | 1,984 | 1,305 | 1,944 | | | 2,014 |

Table 12. PSD, Rapeseeds, 1,000 Metric Tons, 1,000 Hectares

| Oilseed, Rapeseed Russia | 2008 | | | 2009 | | | 2010 | | |
|---------------------------------|--------------------------------|-----|-------------|--------------------------------|-----|-------------|--------------------------------|--|------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Jul 2008 | | | Market Year Begin: Jul 2009 | | | Market Year Begin: Jul 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Area Planted | 650 | 650 | 650 | 570 | 660 | 570 | | | 650 |
| Area Harvested | 575 | 620 | 575 | 600 | 640 | 600 | | | 630 |
| Beginning Stocks | 143 | 143 | 143 | 226 | 133 | 226 | | | 101 |
| Production | 752 | 750 | 752 | 667 | 770 | 667 | | | 760 |
| MY Imports | 1 | 0 | 1 | 5 | 0 | 5 | | | 0 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 1 | 0 | 0 | 1 | 0 | 1 | | | 0 |
| Total Supply | 896 | 893 | 896 | 898 | 903 | 898 | | | 861 |
| MY Exports | 63 | 150 | 63 | 100 | 110 | 110 | | | 80 |
| MY Exp. to EU | 78 | 80 | 78 | 75 | 80 | 75 | | | 75 |
| Crush | 590 | 580 | 590 | 670 | 620 | 670 | | | 680 |
| Food Use Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Feed Waste Dom. Cons. | 17 | 30 | 17 | 17 | 35 | 17 | | | 20 |
| Total Dom. Cons. | 607 | 610 | 607 | 687 | 655 | 687 | | | 700 |
| Ending Stocks | 226 | 133 | 226 | 111 | 138 | 101 | | | 81 |
| Total Distribution | 896 | 893 | 896 | 898 | 903 | 898 | | | 861 |

Table 13. PSD, Peanuts, 1,000 Metric Tons, 1,000 Hectares

| Oilseed, Peanut Russia | 2008 | | | 2009 | | | 2010 | | |
|---------------------------|--------------------------------|----|-------------|--------------------------------|-----|-------------|--------------------------------|--|------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Oct 2008 | | | Market Year Begin: Oct 2009 | | | Market Year Begin: Oct 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Area Planted | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Area Harvested | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Beginning Stocks | 13 | 0 | 13 | 8 | 0 | 8 | | | 8 |
| Production | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imports | 117 | 90 | 85 | 115 | 120 | 100 | | | 105 |
| MY Imp. from U.S. | 15 | 5 | 5 | 15 | 10 | 10 | | | 15 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Supply | 130 | 90 | 98 | 123 | 120 | 108 | | | 113 |
| MY Exports | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Exp. to EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Crush | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Food Use Dom. Cons. | 122 | 90 | 90 | 115 | 120 | 100 | | | 105 |
| Feed Waste Dom. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Dom. Cons. | 122 | 90 | 90 | 115 | 120 | 100 | | | 105 |
| Ending Stocks | 8 | 0 | 8 | 8 | 0 | 8 | | | 8 |
| Total Distribution | 130 | 90 | 98 | 123 | 120 | 108 | | | 113 |

Commodities:

Meal, Sunflowerseed

Meal, Soybean

Meal, Rapeseed

Production:

Modernization of Russia's crushing industry continued in 2009, although the economic crisis and increased debt of some crushing companies slowed down this modernization. The majority of available capital was invested into expansion and modernization of meal production. Soybean crushing capacity increased in Kaliningrad oblast, while in some parts of European Russia crushing companies modernized their plants for rapeseed. The total production of meal is forecast at 4.3 MMT in MY 2010, a 2 percent increase from 2009. Production of sunflowerseed meal will increase from 2.27 MMT to 2.30 MMT, production of soybean meal will increase by 48,000 MT to 1.51 MMT and production of rapeseed meal will increase by 10,000 MT to 410,000 MT.

Consumption:Protein Feeds

Data in the table below show that Russia's domestic consumption (consumption and stocks) of protein meals and feed preparations is increasing. Domestic protein meal and feed consumption are forecast to increase to 4.3 MMT in MY 2010 from 3.5 MMT in MY 2006. The major portion of this consumption is oilseeds meal, especially soybean meal. Consumption of soybean meal has been increasing. The forecast for MY 2010 is 2.0 MMT.

Table 14. Supply, Exports and Consumption of Major Oilseed Meals and Feeds, 1,000 MT

| | MY 2006 | MY 2007 | MY 2008 | MY 2009 (estimate) | MY 2010 (forecast) |
|-----------------------------|--------------|--------------|--------------|-----------------------|-----------------------|
| Total Supply | 4,488 | 4,522 | 4,960 | 5,189 | 5,389 |
| - Sunflowerseeds Meal | 2,280 | 1,971 | 2,310 | 2,301 | 2,331 |
| - Soybean Meal | 1,383 | 1,610 | 1,668 | 1,855 | 2,000 |
| - Rapeseed Meal | 224 | 293 | 352 | 400 | 410 |
| - Fish Meal | 159 | 163 | 177 | 178 | 183 |
| - Animal Feed Preparations* | 346 | 395 | 358 | 360 | 365 |
| - Food Waste** | 43 | 44 | 55 | 55 | 55 |
| - Manufacturing Residue*** | 53 | 46 | 40 | 40 | 45 |
| Exports Total | 945 | 755 | 1,107 | 1,112 | 1,078 |
| - Sunflowerseeds Meal | 866 | 666 | 965 | 950 | 900 |
| - Soybean Meal | 1 | 15 | 14 | 10 | 20 |

| | | | | | |
|---|--------------|--------------|--------------|--------------|--------------|
| - Rapeseeds Meal | 77 | 72 | 99 | 120 | 125 |
| - Fish Meal | 0 | 0 | 26 | 28 | 28 |
| - Animal Feed Preparations | 1 | 2 | 3 | 4 | 5 |
| Consumption and Stocks | 3,543 | 3,767 | 3,853 | 4,077 | 4,311 |
| - Sunflowerseeds Meal | 1,414 | 1,305 | 1,345 | 1,351 | 1,431 |
| - Soybean Meal | 1,382 | 1,595 | 1,654 | 1,845 | 1,980 |
| - Rapeseeds Meal | 147 | 221 | 253 | 280 | 285 |
| - Fish Meal | 159 | 163 | 151 | 150 | 155 |
| - Animal Feed Preparations | 345 | 393 | 355 | 356 | 360 |
| - Food Waste** | 43 | 44 | 55 | 55 | 55 |
| - Manufacturing Residue*** | 53 | 46 | 40 | 40 | 45 |
| | | | | | |
| * Animal Feed Preparations in this table include imported feeds without cats and dogs' feed in retail packs | | | | | |
| ** Food Waste in this table includes imports of food waste without fish meal | | | | | |
| *** Imported manufacturing residue (HS Number 2303) | | | | | |

Source: PSD data, World Trade Atlas data, Moscow FAS Post estimates for MY 2009 and forecasts for MY 2010.

Trade:

Despite increasing domestic demand for protein feeds, Russia still exports larger volumes of oilseeds meal than it imports.

Imports of soybean meal dropped from last year due to tough competition with imported soybeans. In September 2009 through February 2010 Russia imported 217,140 MT of soybean meal, 26 percent less than in the same period last year (292, 487 MT). However, increasing demand for protein feeds might restore imports of soybean meal in MY 2010 to 450,000 MT. Experts estimate that the potential demand for soybean meal is 1.5 – 2.0 MMT per year, while domestic soybean production might cover at best 25-30 percent of this demand. Crush of imported soybeans in Kaliningrad, in spite of increasing capacity of company Sodruzhestvo, could cover only 40-45 percent of this demand. Imports of soybean meal are considered crucial for domestic poultry and pork producers.

| Table 15. Russia: Soybean Meal Imports, Metric Tons | | | |
|---|---------|---------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 478,000 | The World | 390,000 |
| Argentina | 220,175 | Argentina | 150,000 |
| Netherlands | 102,695 | Netherlands | 80,000 |
| Brazil | 56,170 | United States | 60,000 |
| Germany | 48,540 | Brazil | 50,000 |
| United States | 24,715 | Germany | 35,000 |
| Norway | 12,355 | | |

| | | | |
|--|-------|-------|--------|
| Belgium | 4,825 | | |
| China | 2,190 | | |
| Kazakhstan | 1,315 | | |
| India | 160 | | |
| Other | 4,860 | Other | 15,000 |
| MY for soybean meal is from September through August | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

| Table 16. Russia: Fish Meal Imports, Metric Tons | | | |
|--|---------|------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 66,800 | The World | 65,000 |
| Morocco | 38,075 | Morocco | 35,000 |
| Mauritania | 15,780 | Mauritania | 15,000 |
| Peru | 3,495 | Latvia | 3,000 |
| Lithuania | 2,920 | Lithuania | 2,000 |
| Denmark | 1,755 | | |
| Latvia | 1,200 | | |
| Germany | 1,070 | | |
| Argentina | 950 | | |
| France | 705 | | |
| Indonesia | 380 | | |
| Other | 470 | Other | 10,000 |
| MY for fish meal is from October through September | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Russia exports sunflowerseed meal to over 25 different countries. In September 2009- February 2010 Russia exported 449,057 MT of sunflowerseed meal, 10 percent up from the same period last year (408,206 MT). However, total MY exports are estimated at lower than last year's level due to high domestic demand in meal, including sunflowerseed meal that might slow down exports in spring and summer. The major recipients of Russian sunflowerseed meal in September 2009 – February 2010 were Italy (143,465 MT), Turkey (80,230 MT), Spain (42,145 MT), Latvia (39,625 MT), Cyprus (25, 685) and Iran (21,735 MT).

| Table 17. Russia: Sunflowerseeds Meal Exports, Metric Tons | | | |
|--|---------|-----------|---------------------|
| Country | MY 2008 | | MY 2009 (forecast)* |
| The World | 964,805 | The World | 950,000 |
| Italy | 296,640 | Italy | 250,000 |
| Spain | 128,560 | Turkey | 130,000 |
| Turkey | 116,450 | Spain | 110,000 |
| Latvia | 100,490 | Latvia | 100,000 |
| Egypt | 61,825 | Cyprus | 60,000 |

| | | | |
|--|--------|---------|---------|
| France | 52,360 | Morocco | 50,000 |
| Cyprus | 40,530 | Iran | 25,000 |
| Morocco | 31,870 | | |
| Syria | 28,820 | | |
| Greece | 24,120 | | |
| Other | 83,140 | Other | 225,000 |
| MY for sunflowerseeds is from September through August | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

In July 2009 through January 2010 Russia exported 97,000 MT of rapeseeds meal, almost 50 percent more than in the same period a year ago. However, exports slowed in January 2010, and the total MY 2010 exports will be only 21 percent higher than in MY 2009.

| Table 18. Russia: Rapeseeds Meal Exports, Metric Tons | | | |
|---|---------|------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 99,431 | The World | 120,000 |
| Spain | 47,149 | Spain | 50,000 |
| Latvia | 23,097 | Iran | 20,000 |
| Turkey | 8,300 | Latvia | 15,000 |
| Israel | 4,986 | Turkey | 10,000 |
| Morocco | 4,954 | Italy | 6,000 |
| Denmark | 3,917 | Denmark | 4,000 |
| Estonia | 3,719 | Israel | 3,000 |
| Cyprus | 1,545 | Azerbaijan | 2,000 |
| Iran | 1,188 | | |
| Lithuania | 577 | | |
| Other | 0 | Other | 10,000 |
| MY for rapeseeds is from July through June | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

Policy:

Since March 6, 2009, the Russian government introduced a temporary 5 percent import duty on soybean meal, and then fixed it in November 2009 despite the Russian Grain Union's recommendations to lift this duty. All meals are exported duty free.

Production, Supply and Demand Data Statistics:

Table 19. PSD, Sunflowerseed Meal, 1,000 Metric Tons

| Meal, Sunflowerseed | 2008 | 2009 | 2010 |
|---------------------|-----------|-----------|-----------|
| | 2008/2009 | 2009/2010 | 2010/2011 |

| Russia | Market Year Begin: Sep 2008 | | | Market Year Begin: Sep 2009 | | | Market Year Begin: Sep 2010 | | |
|-----------------------|--------------------------------|-------|-------------|--------------------------------|-------|-------------|-----------------------------------|--|--------|
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Crush | 6,210 | 6,100 | 6,210 | 6,045 | 6,300 | 6,105 | | | 6,200 |
| Extr. Rate, 999.9999 | 0. | 0. | 0.3713 | 0. | 0. | 0.3718 | | | 0.3718 |
| Beginning Stocks | 4 | 4 | 4 | 16 | 39 | 16 | | | 11 |
| Production | 2,306 | 2,305 | 2,306 | 2,246 | 2,375 | 2,270 | | | 2,305 |
| MY Imports | 0 | 10 | 0 | 15 | 10 | 15 | | | 15 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Supply | 2,310 | 2,319 | 2,310 | 2,277 | 2,424 | 2,301 | | | 2,331 |
| MY Exports | 965 | 800 | 965 | 920 | 830 | 950 | | | 900 |
| MY Exp. to EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Industrial Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Food Use Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Feed Waste Dom. Cons. | 1,329 | 1,480 | 1,329 | 1,343 | 1,555 | 1,340 | | | 1,410 |
| Total Dom. Cons. | 1,329 | 1,480 | 1,329 | 1,343 | 1,555 | 1,340 | | | 1,410 |
| Ending Stocks | 16 | 39 | 16 | 14 | 39 | 11 | | | 21 |
| Total Distribution | 2,310 | 2,319 | 2,310 | 2,277 | 2,424 | 2,301 | | | 2,331 |

Table 20. PSD, Soybean Meal, 1,000 Metric Tons

| Meal, Soybean Russia | 2008 | | | 2009 | | | 2010 | | |
|-------------------------|--------------------------------|-------|-------------|--------------------------------|-------|-------------|-----------------------------------|--|--------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Sep 2008 | | | Market Year Begin: Sep 2009 | | | Market Year Begin: Sep 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Crush | 1,497 | 1,125 | 1,497 | 1,850 | 1,180 | 1,850 | | | 1,920 |
| Extr. Rate, 999.9999 | 1. | 1. | 0.7849 | 1. | 1. | 0.7876 | | | 0.7865 |
| Beginning Stocks | 14 | 15 | 15 | 8 | 12 | 8 | | | 40 |
| Production | 1,176 | 887 | 1,175 | 1,457 | 928 | 1,457 | | | 1,510 |
| MY Imports | 478 | 480 | 478 | 340 | 500 | 390 | | | 450 |
| MY Imp. from U.S. | 40 | 20 | 40 | 40 | 60 | 40 | | | 45 |
| MY Imp. from EU | 150 | 80 | 150 | 150 | 80 | 150 | | | 120 |
| Total Supply | 1,668 | 1,382 | 1,668 | 1,805 | 1,440 | 1,855 | | | 2,000 |

| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
|-----------------------|--------------------------|-----|-------------|--------------------------|-----|-------------|--------------------------|--|--------|
| | | | Data | | | Data | | | Data |
| Catch For Reduction | 425 | 380 | 425 | 380 | 430 | 380 | | | 400 |
| Extr. Rate, 999.9999 | 0. | 0. | 0.2518 | 0. | 0. | 0.2895 | | | 0.2875 |
| Beginning Stocks | 3 | 3 | 3 | 3 | 3 | 3 | | | 3 |
| Production | 107 | 95 | 107 | 110 | 110 | 110 | | | 115 |
| MY Imports | 67 | 55 | 67 | 65 | 55 | 65 | | | 65 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 10 | 15 | 10 | 10 | 15 | 10 | | | 10 |
| Total Supply | 177 | 153 | 177 | 178 | 168 | 178 | | | 183 |
| MY Exports | 26 | 0 | 26 | 28 | 0 | 28 | | | 28 |
| MY Exp. to EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Industrial Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Food Use Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Feed Waste Dom. Cons. | 148 | 150 | 148 | 147 | 165 | 147 | | | 147 |
| Total Dom. Cons. | 148 | 150 | 148 | 147 | 165 | 147 | | | 147 |
| Ending Stocks | 3 | 3 | 3 | 3 | 3 | 3 | | | 8 |
| Total Distribution | 177 | 153 | 177 | 178 | 168 | 178 | | | 183 |

Commodities:

Oil, Sunflowerseed

Oil, Soybean

Oil, Rapeseed

Oil, Palm

Production:

The demand for protein feeds increased the importance of meal production. However, vegetable oil still remains the primary product for the majority of crushing plants. The total oil production forecast remains at almost the same level as in 2009: 3.17 MMT versus 3.11 MMT.

Table 23. Russia: Vegetable Oil Production, MYs 2000-2009, 1,000 Metric Tons, by Months.

| | MY 00 | MY 01 | MY 02 | MY 03 | MY 04 | MY 05 | MY 06 | MY 07 | MY 08 | MY 09 |
|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------------|
| Sep. | 67 | 67 | 86 | 85 | 103 | 167 | 159 | 206 | 161 | 204 |
| Oct. | 150 | 138 | 155 | 186 | 186 | 250 | 276 | 305 | 300 | 335 |
| Nov. | 160 | 148 | 176 | 188 | 203 | 246 | 281 | 280 | 310 | 341 |
| Dec. | 174 | 131 | 183 | 196 | 212 | 260 | 286 | 234 | 324 | 330 |
| Jan. | 123 | 103 | 145 | 173 | 172 | 209 | 246 | 162 | 241 | 237 |
| Feb. | 119 | 78 | 129 | 159 | 160 | 213 | 243 | 199 | 273 | 270 |
| Mar. | 122 | 69 | 133 | 157 | 170 | 233 | 250 | 234 | 294 | 285 |
| Apr. | 106 | 79 | 121 | 149 | 181 | 235 | 258 | 185 | 279 | 270 |
| May | 94 | 59 | 97 | 142 | 172 | 203 | 227 | 178 | 281 | 250 |
| Jun. | 81 | 69 | 96 | 136 | 152 | 222 | 188 | 163 | 281 | 240 |
| Jul. | 61 | 73 | 85 | 126 | 146 | 186 | 176 | 127 | 243 | 220 |
| Aug | 36 | 54 | 55 | 100 | 114 | 145 | 122 | 122 | 189 | 190 |
| | | | | | | | | | | |
| MY Total | 1,293 | 1,067 | 1,460 | 1,797 | 1,971 | 2,569 | 2,712 | 2,395 | 3,176 | 3,172 |

Source: Russian State Statistical Service (Rosstat). Figures for February-August 2009 are Post's estimates.

Consumption:

The total domestic consumption (including end-of-year stocks) of vegetable oil in MY 2010 is forecast at 3.1 MMT, almost the same as in MY 2009, and slightly below MY 2008 level. There are no data on the stocks of vegetable oil by the end of marketing year, but in 2009 and 2010 stocks decreased from the 2008 level. Sunflowerseed oil dominates domestic consumption. Its share in MY 2008 was 63 percent, and in MY 2009 is estimated at 66 percent. The major portion of sunflowerseed oil is bottled for human consumption. The share of imported palm oil is estimated at 16 percent in MY 2009, a significant decrease from 22 percent in MY 2006. Most palm oil is used in the food industry, including in production of ice cream and spreads, where palm oil replaced not only domestic vegetable oils, but also milk fat. Since 2006 the Russian government lifted and then resumed import duties on tropical oils several times depending on the lobby of different producers' groups. The present import duty on palm oil in bins and boxes net weight 200 kg or less is 15 percent, but not less than 0.12 Euro per

kilogram. Palm oil for industrial use is imported duty-free. Russia's food industry demand for palm oil may also decrease due to the expected legislation which will not allow palm and other vegetable oils in products that are called "butter" and in traditional (dairy/creamy) ice-cream.

Table 24. Supply of Vegetable Oils (Sum of Stocks, Production, and Imports), and exports, MY 2008, 2009 (estimate), 2010 (forecast), 1,000 Metric Tons

| | MY 2006 | MY 2007 | MY 2008 | MY 2009 (estimate) | MY 2010 (forecast) |
|------------------------|------------|------------|------------|-----------------------|-----------------------|
| Total Supply | 3,352 | 3,912 | 4,169 | 3,941 | 3,958 |
| - Sunflowerseeds Oil | 2,260 | 2,384 | 2,779 | 2,619 | 2,630 |
| - Soybean Oil | 157 | 308 | 366 | 364 | 370 |
| - Rapeseed Oil | 168 | 196 | 264 | 281 | 278 |
| - Palm Oil | 574 | 784 | 595 | 510 | 510 |
| - Coconut Oil | 175 | 215 | 145 | 140 | 140 |
| - Olive Oil | 14 | 17 | 15 | 17 | 20 |
| - Other Vegetable Oil | 4 | 8 | 5 | 10 | 10 |
| Exports Total | 772 | 359 | 1,020 | 842 | 866 |
| - Sunflowerseeds Oil | 710 | 321 | 802 | 580 | 600 |
| - Soybean Oil | 5 | 10 | 127 | 140 | 145 |
| - Rapeseeds Oil | 55 | 27 | 89 | 120 | 120 |
| - Palm Oil | 1 | 0 | 1 | 1 | 0 |
| - Coconut Oil | 0 | 0 | 0 | 0 | 0 |
| - Olive Oil | 0 | 0 | 0 | 0 | 0 |
| - Other Vegetable Oils | 1 | 1 | 1 | 1 | 1 |
| Consumption and Stocks | 2,580 | 3,553 | 3,149 | 3,099 | 3,092 |
| - Sunflowerseeds Oil | 1,550 | 2,063 | 1,977 | 2,039 | 2,030 |
| - Soybean Oil | 152 | 298 | 239 | 224 | 225 |
| - Rapeseeds Oil | 113 | 169 | 175 | 161 | 158 |
| - Palm Oil | 573 | 784 | 594 | 509 | 510 |
| - Coconut Oil | 175 | 215 | 145 | 140 | 140 |
| - Olive Oil | 14 | 17 | 15 | 17 | 20 |
| - Other Vegetable Oils | 3 | 7 | 4 | 9 | 9 |

Source: PSD data, World Trade Atlas data, Moscow FAS Post estimates for MY 2009 and forecasts for MY 2010.

Trade:

Exports of sunflowerseed oil in September 2009 – February 2010 were 231,495 MT, while a year ago in September – February Russia exported 408,200 MT of sunflowerseeds oil.

| Table 25. Russia: Sunflowerseeds Oil Exports, Metric Tons | | | |
|---|---------|------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 802,000 | The World | 580,000 |
| Turkey | 159,634 | Turkey | 130,000 |
| Italy | 95,085 | Kazakhstan | 120,000 |
| Kazakhstan | 82,514 | Egypt | 50,000 |
| Spain | 66,731 | Uzbekistan | 35,000 |
| India | 60,336 | Iran | 30,000 |
| Syria | 49,589 | Spain | 15,000 |
| Greece | 42,744 | | |
| Netherlands | 38,779 | | |
| Iran | 35,704 | | |
| Egypt | 31,096 | | |
| Other | 139,997 | Other | 200,000 |
| MY for sunflowerseeds oil is September through August | | | |

Source: WTA for MY 2008 and FAS Moscow Post estimates for MY 2009.

In July 2008 – through February 2010 Russia exported 80,570 MT of rapeseeds oil, a 7 percent increase from exports in the same period a year ago. Russia exports rapeseeds oil primarily to European countries: Italy, France, Lithuania, Latvia and Greece.

Since crushing plants in Kaliningrad began crushing soybeans, Russia began exporting soybean oil. In MY 2008 soybean oil exports reached 127,000 MT and may reach 140,000 MT in MY 2009. In September – February Russia exported 87,120 MT of soybean oil to Tunisia, France, United Kingdom, Italy, Poland, Belgium, Denmark and Algeria. In the same period a year ago soybean oil exports were only 54,240 MT.

Palm oil dominates Russia's vegetable oil imports, but imports are decreasing as the domestic crushing grows.

In October 2009 – February 2010, Russia imported 202,844 MT of palm oil: including 87,370 MT of palm oil from Malaysia, 43,514 MT from Ukraine, 39,689 MT from Indonesia, 17,488 MT from Netherlands, and 12,403 MT – from Germany. In the same period a year ago Russian imports of palm oil were 240,805 MT.

| Table 26. Russia: Palm Oil Imports, Metric Tons | | | |
|---|---------|-------------|--------------------|
| Country | MY 2008 | | MY 2009 (estimate) |
| The World | 516,752 | The World | 500,000 |
| Malaysia | 284,805 | Malaysia | 190,000 |
| Indonesia | 97,753 | Ukraine | 100,000 |
| Ukraine | 66,412 | Indonesia | 80,000 |
| Netherlands | 54,022 | Netherlands | 50,000 |

| | | | | | | | | | |
|--------------------|-------|-------|-------|-------|-------|-------|--|--|-------|
| Total Dom. Cons. | 1,918 | 1,923 | 1,918 | 1,986 | 1,945 | 2,019 | | | 2,005 |
| Ending Stocks | 59 | 104 | 59 | 20 | 99 | 20 | | | 25 |
| Total Distribution | 2,779 | 2,737 | 2,779 | 2,606 | 2,764 | 2,619 | | | 2,630 |

Table 28. PSD, Soybean Oil, 1,000 Metric Tons

| Russia Oil, Soybean | 2008 | | | 2009 | | | 2010 | | |
|------------------------|--------------------------------|-------|-------------|--------------------------------|-------|-------------|--------------------------------|--|--------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Sep 2008 | | | Market Year Begin: Sep 2009 | | | Market Year Begin: Sep 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Crush | 1,497 | 1,125 | 1,497 | 1,850 | 1,180 | 1,850 | | | 1,920 |
| Extr. Rate, 999.9999 | 0. | 0. | 0.1777 | 0. | 0. | 0.1789 | | | 0.1797 |
| Beginning Stocks | 78 | 78 | 78 | 13 | 38 | 13 | | | 5 |
| Production | 266 | 200 | 266 | 331 | 210 | 331 | | | 345 |
| MY Imports | 22 | 20 | 22 | 20 | 40 | 20 | | | 20 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 12 | 15 | 12 | 12 | 20 | 12 | | | 12 |
| Total Supply | 366 | 298 | 366 | 364 | 288 | 364 | | | 370 |
| MY Exports | 127 | 70 | 127 | 130 | 75 | 140 | | | 145 |
| MY Exp. to EU | 70 | 25 | 70 | 80 | 30 | 80 | | | 90 |
| Industrial Dom. Cons. | 30 | 30 | 30 | 30 | 30 | 30 | | | 30 |
| Food Use Dom. Cons. | 196 | 160 | 196 | 199 | 160 | 189 | | | 190 |
| Feed Waste Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Dom. Cons. | 226 | 190 | 226 | 229 | 190 | 219 | | | 220 |
| Ending Stocks | 13 | 38 | 13 | 5 | 23 | 5 | | | 5 |
| Total Distribution | 366 | 298 | 366 | 364 | 288 | 364 | | | 370 |

Table 29. PSD, Rapeseed Oil, 1,000 Metric Tons

| Russia Oil, Rapeseed | 2008 | | | 2009 | | | 2010 | | |
|-------------------------|--------------------------------|-----|-------------|--------------------------------|-----|-------------|--------------------------------|--|------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Jul 2008 | | | Market Year Begin: Jul 2009 | | | Market Year Begin: Jul 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Crush | 590 | 580 | 590 | 670 | 620 | 670 | | | 680 |

| | | | | | | | | | |
|-----------------------|-----|-----|--------|-----|-----|--------|--|--|--------|
| Extr. Rate, 999.9999 | 0. | 0. | 0.3915 | 0. | 0. | 0.3925 | | | 0.3941 |
| Beginning Stocks | 32 | 32 | 32 | 18 | 20 | 18 | | | 10 |
| Production | 231 | 230 | 231 | 263 | 250 | 263 | | | 268 |
| MY Imports | 1 | 1 | 1 | 0 | 0 | 0 | | | 0 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Supply | 264 | 263 | 264 | 281 | 270 | 281 | | | 278 |
| MY Exports | 89 | 78 | 89 | 120 | 75 | 120 | | | 120 |
| MY Exp. to EU | 75 | 50 | 75 | 63 | 25 | 63 | | | 65 |
| Industrial Dom. Cons. | 20 | 20 | 20 | 20 | 30 | 20 | | | 20 |
| Food Use Dom. Cons. | 137 | 145 | 137 | 131 | 145 | 131 | | | 120 |
| Feed Waste Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Dom. Cons. | 157 | 165 | 157 | 151 | 175 | 151 | | | 140 |
| Ending Stocks | 18 | 20 | 18 | 10 | 20 | 10 | | | 18 |
| Total Distribution | 264 | 263 | 264 | 281 | 270 | 281 | | | 278 |

Table 30. PSD, Palm Oil, 1,000 Metric Tons

| Russia Oil, Palm | 2008 | | | 2009 | | | 2010 | | |
|-----------------------|--------------------------------|-----|-------------|--------------------------------|-----|-------------|--------------------------------|--|------|
| | 2008/2009 | | | 2009/2010 | | | 2010/2011 | | |
| | Market Year Begin: Oct 2008 | | | Market Year Begin: Oct 2009 | | | Market Year Begin: Oct 2010 | | |
| | USDA Official Data | | New Post | USDA Official Data | | New Post | USDA Official Data | | Apr |
| | | | Data | | | Data | | | Data |
| Area Planted | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Area Harvested | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Trees | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Beginning Stocks | 78 | 78 | 78 | 10 | 29 | 10 | | | 10 |
| Production | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imports | 517 | 550 | 517 | 500 | 620 | 500 | | | 500 |
| MY Imp. from U.S. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| MY Imp. from EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Supply | 595 | 628 | 595 | 510 | 649 | 510 | | | 510 |
| MY Exports | 1 | 0 | 1 | 1 | 0 | 1 | | | 0 |
| MY Exp. to EU | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Industrial Dom. Cons. | 129 | 110 | 129 | 99 | 120 | 99 | | | 100 |
| Food Use Dom. Cons. | 455 | 489 | 455 | 400 | 509 | 400 | | | 400 |
| Feed Waste Dom. Cons. | 0 | 0 | 0 | 0 | 0 | 0 | | | 0 |
| Total Dom. Cons. | 584 | 599 | 584 | 499 | 629 | 499 | | | 500 |
| Ending Stocks | 10 | 29 | 10 | 10 | 20 | 10 | | | 10 |

| | | | | | | | | | |
|--------------------|-----|-----|-----|-----|-----|-----|--|--|-----|
| Total Distribution | 595 | 628 | 595 | 510 | 649 | 510 | | | 510 |
|--------------------|-----|-----|-----|-----|-----|-----|--|--|-----|